



Departmental Quarterly Performance Report

Department Name: Property Appraisal

**Reporting Period:
2004-2005
3rd Quarter**

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MAJOR PERFORMANCE INITIATIVES

Describe Key Initiatives and Status

Check all that apply

Conducting Real Estate Field Inspections is a primary department activity which is necessary to accomplish the goal of submitting a certified assessment roll to the Florida Department of Revenue by July 1 of each roll year. In the 2004-05 third quarter, the department completed the 2005 assessment roll with 29,149 total inspections: 12,347 regular maintenance inspections and 16,802 new construction inspections. A fieldwork-tracking database was implemented in 2005 to improve quality control.

Real Estate Inspections 2004-05		
	New Buildings	Regular Maintenance
1 st quarter **	9,426	7,098
2 nd quarter **	5,724	3,306
3 rd quarter	1,652	1,943
Total Inspections		
1 st through 3 rd qtr	29,149	

**Numbers adjusted from previous report to accurately reflect completion of all data entry.

☒ Strategic Plan
☒ Business Plan
☒ Budgeted Priorities
☒ Customer Service
☐ Workforce Dev.
☐ Audit Response
☐ Other _____
 (Describe)

Ownership changes processed using the **Clerk of the Courts' Imaging system (COC)** is an essential function of the department. These changes facilitate the sales comparison approach to value, application and removal of Homestead Exemptions.

FY 2004-2005	Documents Processed
Quarter 1	30,074
Quarter 2	33,511
Quarter 3	29,536
Quarter 4	
FY Total	93,121

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Tangible Personal Property Field Inspections, started on September 23, 2004, and was completed as of February 17, with a total of 87,833 locations being inspected for the 2005 assessment roll year. The clerical processing of the field books started the week of October 31, 2004, and as of December 31, 2004, 51% of the field inspections were posted, as of February 18, 2005, 100% of the field inspections were posted.

During this quarter, the Tangible Personal Property Division received 681 written correction requests with 189 corrections processed, 2,134 phone inquiries and 323 front counter visits. The Division also processed 45,603 Tangible Personal Property tax returns.

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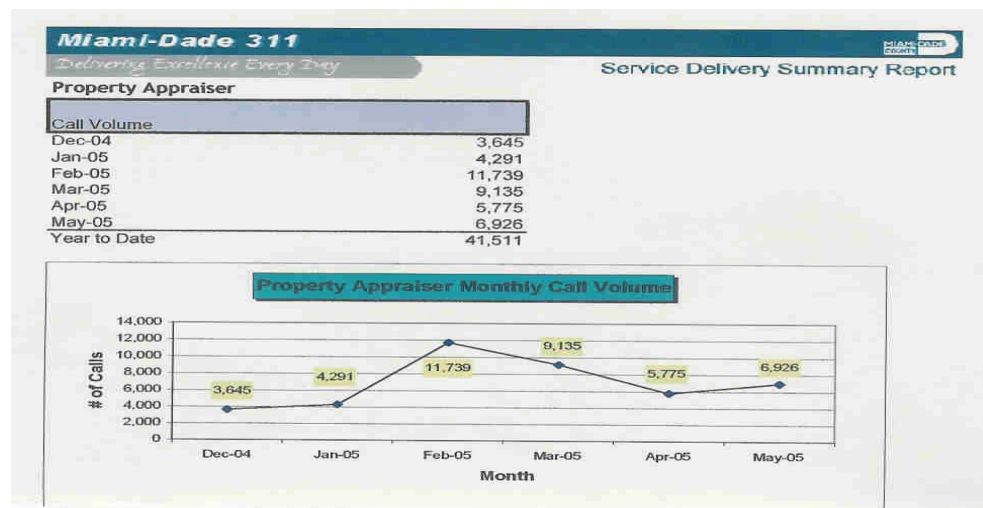
<p>The 2005 exemption filing cycle commenced with <u>the Homestead Exemption Division</u> mailing 41,964 Senior Renewal Receipts and 409,017 Homestead Exemption receipts at the end of the first quarter.</p> <p><u>As of the third quarter</u> 49,523 new homestead exemption applications, 32,740 senior citizen exemption (renewals) and 3,557 new senior citizen exemption (long forms) were received and processed.</p>	<p><input checked="" type="checkbox"/> <i>Strategic Plan</i> <input checked="" type="checkbox"/> <i>Business Plan</i> <input checked="" type="checkbox"/> <i>Budgeted Priorities</i> <input checked="" type="checkbox"/> <i>Customer Service</i> <input type="checkbox"/> <i>Workforce Dev.</i> <input type="checkbox"/> <i>Audit Response</i> <input type="checkbox"/> <i>Other</i> _____ <i>(Describe)</i></p>
<p>The Department is in the first phase of implementing <u>the Computer Aided Mass Appraisal (CAMA)</u> system which will improve the organization's daily business transactions and database processes.</p> <p>This project continues to move forward on three major fronts; data conversion, system configuration and interface development. Data conversion mapping is progressing to the point where a recalculation of values will soon be possible. Many look-up tables have been created. Efforts have begun on the data to be passed back to the mainframe for legacy users of PTX. Interfaces are proceeding with focus on NewVision/COC deed processing, ETSD mainframe, and the Tax Collector.</p> <p>GIS component included conversion of GIS data to Geo-database model for CAMA integration. Demonstration and discussion of GIS coordination with ETSD. Development of training plan started with training scheduled to begin in September with Vendor's on-site staff.</p> <p>Implementation is scheduled to begin this October with the first phase continuing through January.</p>	<p><input checked="" type="checkbox"/> <i>Strategic Plan</i> <input checked="" type="checkbox"/> <i>Business Plan</i> <input checked="" type="checkbox"/> <i>Budgeted Priorities</i> <input type="checkbox"/> <i>Customer Service</i> <input type="checkbox"/> <i>Workforce Dev.</i> <input type="checkbox"/> <i>Audit Response</i> <input type="checkbox"/> <i>Other</i> _____ <i>(Describe)</i></p>

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In keeping with the Manager's mandate to County Departments concerning **the Answer Center 311 Initiative**, The Property Appraisal Department transferred two clerical positions to the 311 Center; one staff member was assigned during the tax collector's billing cycle (November 2004) to provide property appraisal support; The Department conducted four days of training with 311 center staff in advance of the courtesy exemption application mailings in December. The Miami-Dade 311 Answer Center provided the following grid and graph.



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 (Describe)

The Homestead Investigation Unit's primary responsibility is the investigation of property exemptions erroneously applied. During the first quarter the unit filed liens for a value \$278,881. During the second quarter the unit filed liens for a value of \$84,200. The decrease in lien value is due to the reassignment of investigation staff to help during the exemption filing cycle, which takes place during the second quarter of the fiscal year.

As of the third quarter the unit filed liens for a value of \$769,633. The unit added \$434,690,291, to the 2005 tax roll by removing exemptions and capped values for properties, which did not qualify for the Homestead Exemption. This equates to approximately \$5.2 million in revenue for the County.

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PERSONNEL SUMMARY

A. Filled/Vacancy Report

NUMBER OF FULL-TIME POSITIONS*	Filled as of September 30 of Prior Year	Current Year Budget	Actual Number of Filled and Vacant positions at the end of each quarter							
			Quarter 1		Quarter 2		Quarter 3		Quarter 4	
			Filled	Vacant	Filled	Vacant	Filled	Vacant	Filled	Vacant
			244	17	246	13	250	8		
	241	261								

* Public Safety Departments should report the sworn versus non-sworn personnel separately and Departments with significant part-time, temporary or seasonal help should report these separately.

Note: In the Current Year Budget, two clerical positions are budgeted for the 311 Answer Center, which accounts for 261 total positions with filled and vacant totaling 259 in the first and second quarters. As of the third quarter, the Property Appraisal Project Administrator position has been removed from the Department's County Table of Organization, resulting in a total of 258 positions.

Notes:

B. Key Vacancies

Department is in the hiring stages for 18 newly budgeted positions that were authorized for the 2005-06 FY.

C. Turnover Issues

None at this time

D. Skill/Hiring Issues

None at this time

E. Part-time, Temporary and Seasonal Personnel

(Including the number of temporaries long-term with the Department)

F. Other Issues

Administration is implementing a succession plan to prepare the smooth transition of Administrative responsibilities pending the upcoming retirement of top administrative personnel. Frank Jacobs was appointed to succeed Joel Robbins as Property Appraiser. He will assume the duties July 1, 2005. Marcus Saiz and Lazaro Solis have been promoted to the position of Assistant Property Appraiser.

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FINANCIAL SUMMARY

(All Dollars in Thousands)

	PRIOR YEAR Actual	CURRENT FISCAL YEAR						
		Total Annual Budget	3rd Quarter		Year-to-date			
			Budget	Actual	Budget	Actual	\$ Variance	% of Annual Budget
Revenues								
General Fund	17748	18489	4622	4862	18489	14552	-240	78.7%
Reimbursement	-1251							
Budget Adj								
♦								
Total	16497	18489	4622	4862	18489	14552	-240	78.7%
Expense*								
Personnel	15276	16784	4196	4581	16784	13640	-385	81.3%
Operating	1208	1705	426	281	1705	912	145	53.5%
Capital	13							
Total	16497	18489	4622	4862	18489	14552	-240	78.7%

* Expenditures may be reported by activity as contained in your budget or may be reported by category (personnel, operating and capital).

Note:

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STATEMENT OF PROJECTION AND OUTLOOK

The Department projects to be within authorized budgeted expenditures and projects that available revenues will exceed expenses except as noted below:

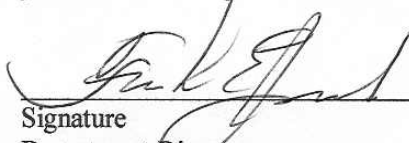
Notes and Issues:

(Summarize any concern or exception which will prohibit the Department from being within authorized budgeted expenditures and available revenues)

The Department will receive a \$647,000 budget amendment for the 2004-05 fiscal year. This will cover the additional cost for overtime, retirement payouts, and additional personnel for the 2005-06 year to be hired in the fourth quarter of the 2004-05 fiscal year.

DEPARTMENT DIRECTOR REVIEW

The Department Director has reviewed this report in its entirety and agrees with all information presented including the statement of projection and outlook.



Signature
Department Director

Date 7/29/05